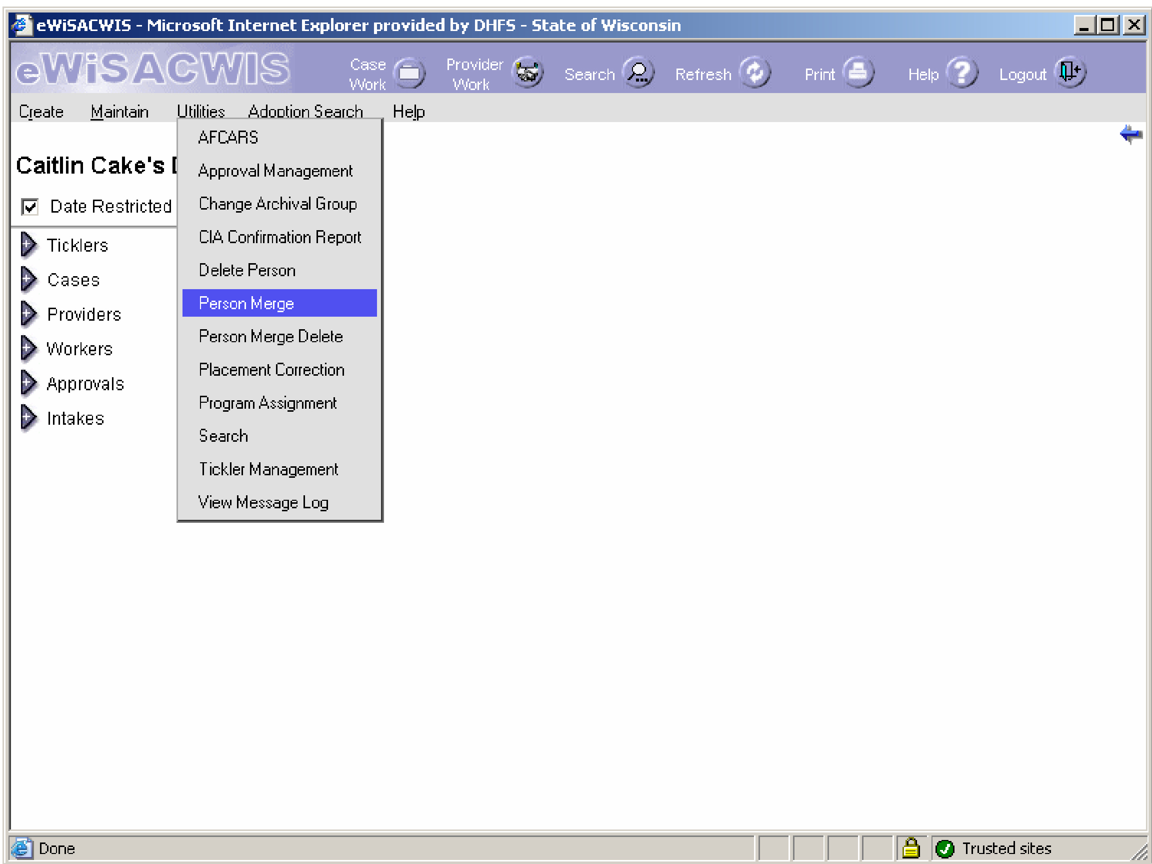
Person Merge

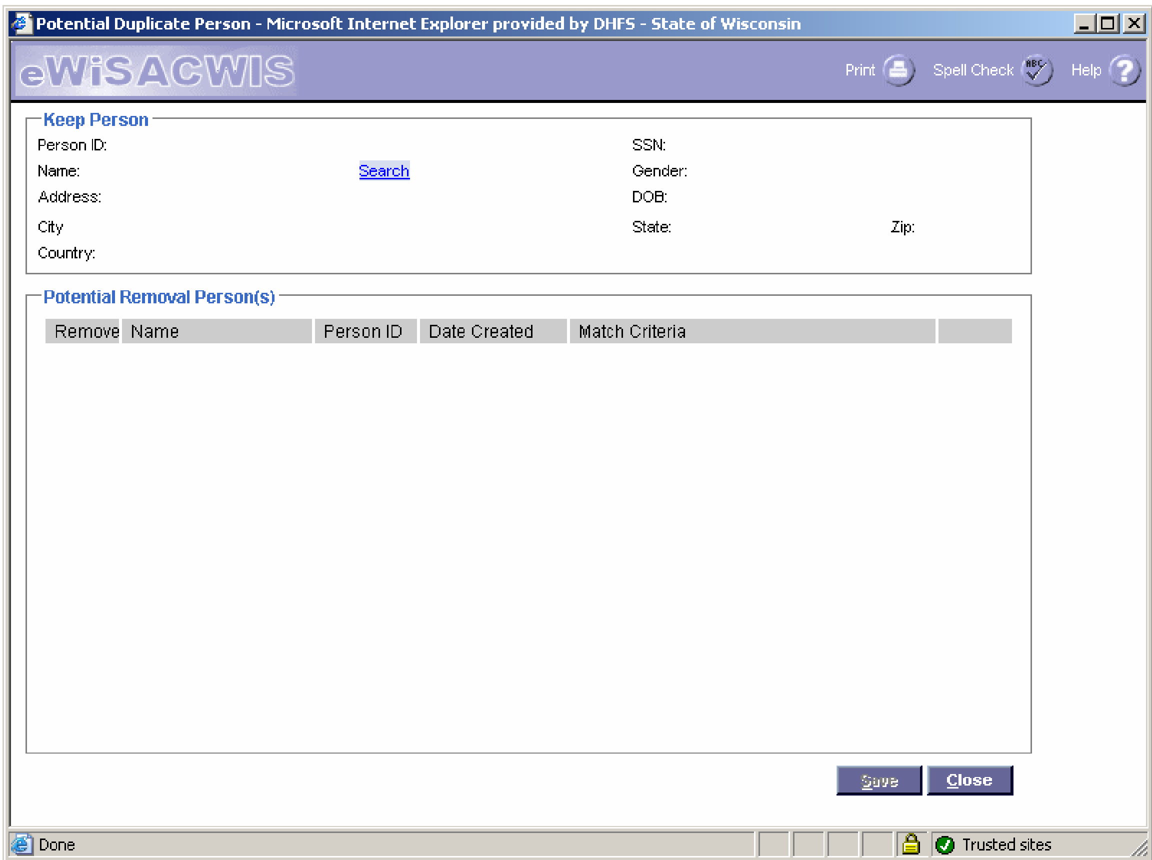
Person Merge will incorporate two distinct person merge features. The first feature is the Manual Merge process. This process will require the user to identify potential duplicates and merge them together manually. The second process, the system will identify potential matches via the Case Maintenance page. Potential duplicate people will be identified with a '?' next to the participants name. The user will be directed to the merge page with possible potential duplicates identified.

Manual Merge

1. From the desktop, go to Utilities and select Person Merge.

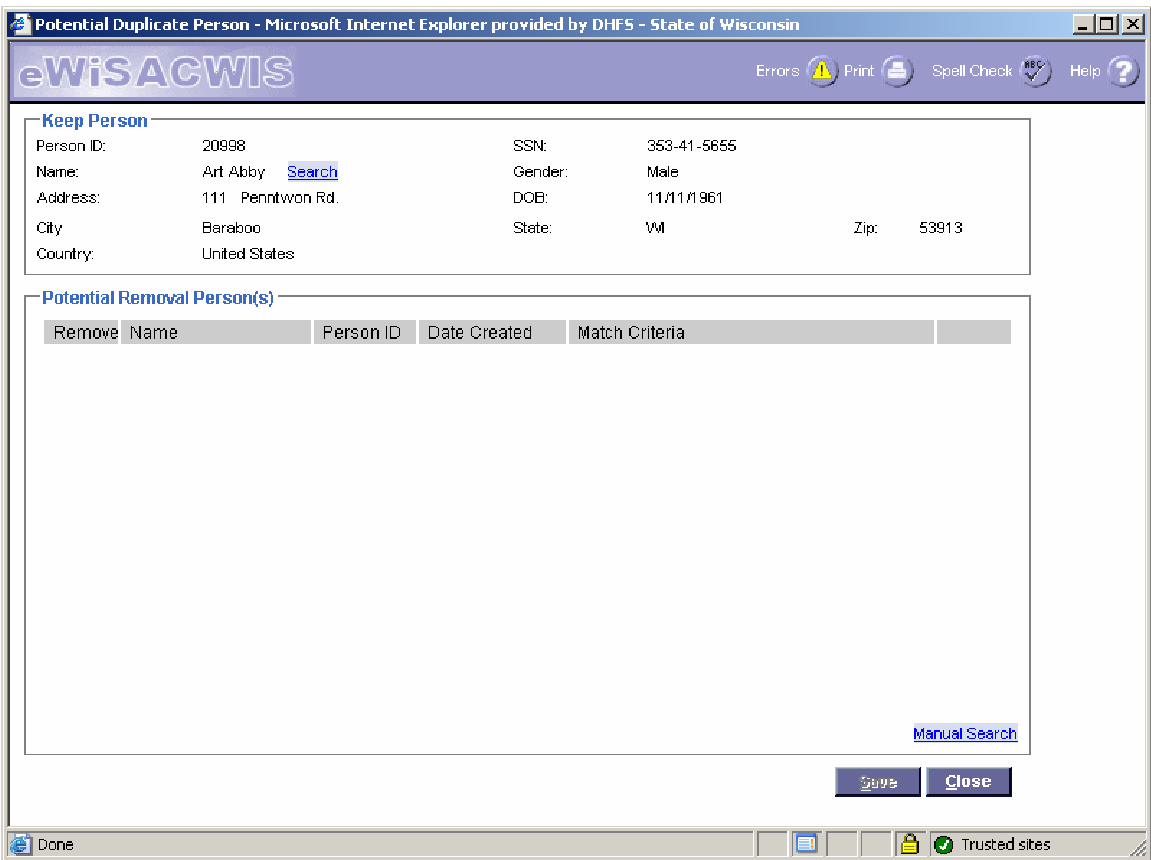


2. The Potential Duplicate Person Merge window will open. Use the Search hyperlink in the 'Keep' group box to identify the person record that is to be retained. (See the Search Quick Reference Guide on proper techniques for searching.)

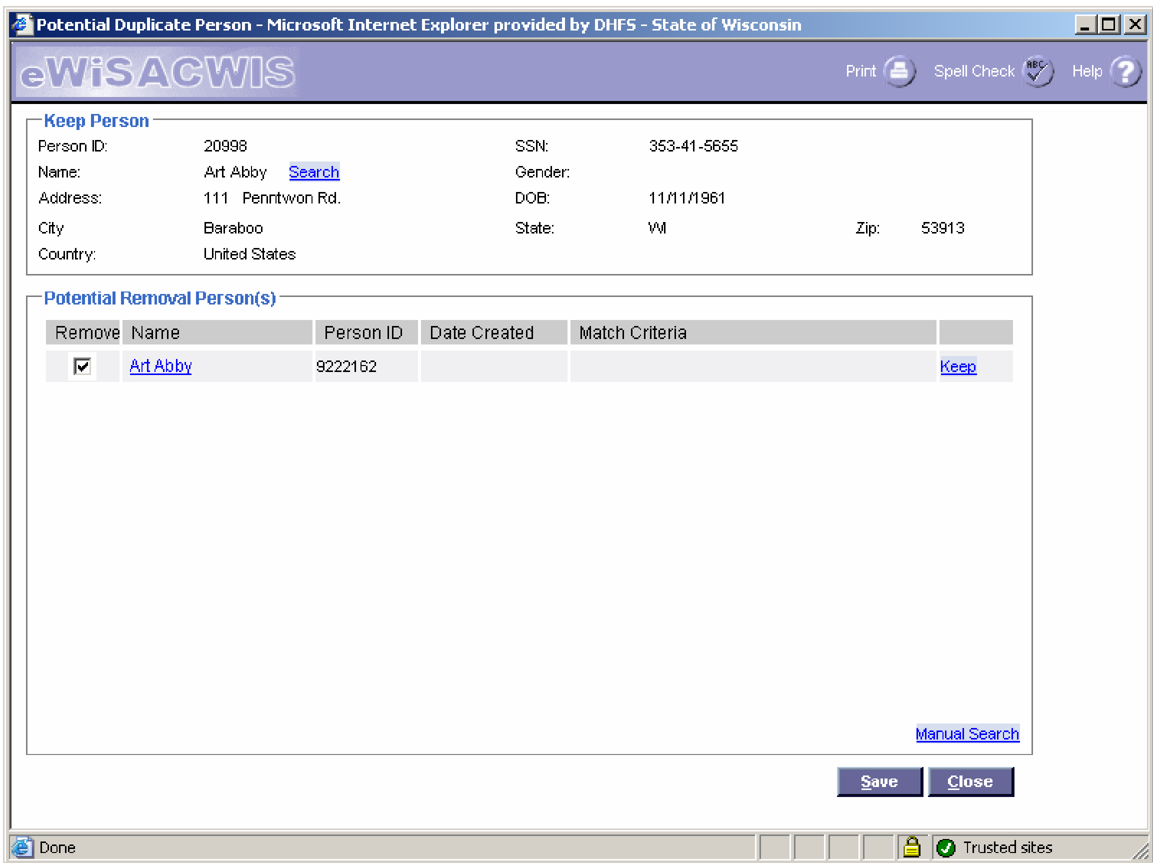


3. The ‘Keep Person’ group box will pre-fill with the identified person’s (keep person) demographic information. The Search hyperlink is still enabled in case the wrong person id record was selected in error and a new person needs to be searched.

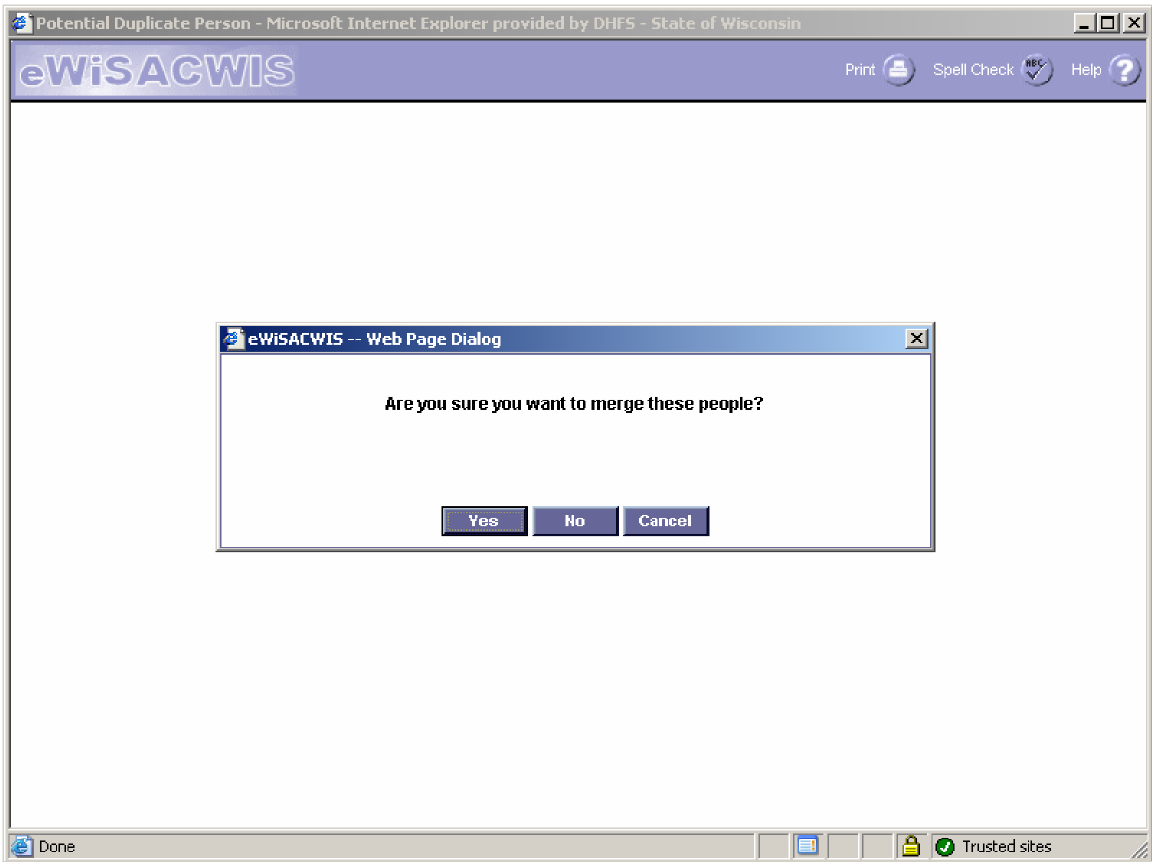
4. In the Potential Removal Persons group box, select the ‘Manual Search’ hyperlink to search out the person record that is to be merged and removed.



5. The duplicate person id record will pre-fill into the Potential Removal Persons group box. The 'Remove' check box will become enabled and checked. Mark sure the check box is checked in order to merge the records. The duplicate person's name will be a hyperlink. The person management record can be accessed through this hyperlink to view demographic information. The 'Keep' hyperlink will remove the current 'Keep' person record and move the Potential Removal Person record up to the 'Keep' position. (This would be used if it was determined that the Potential Removed Person should be the Keep Person).

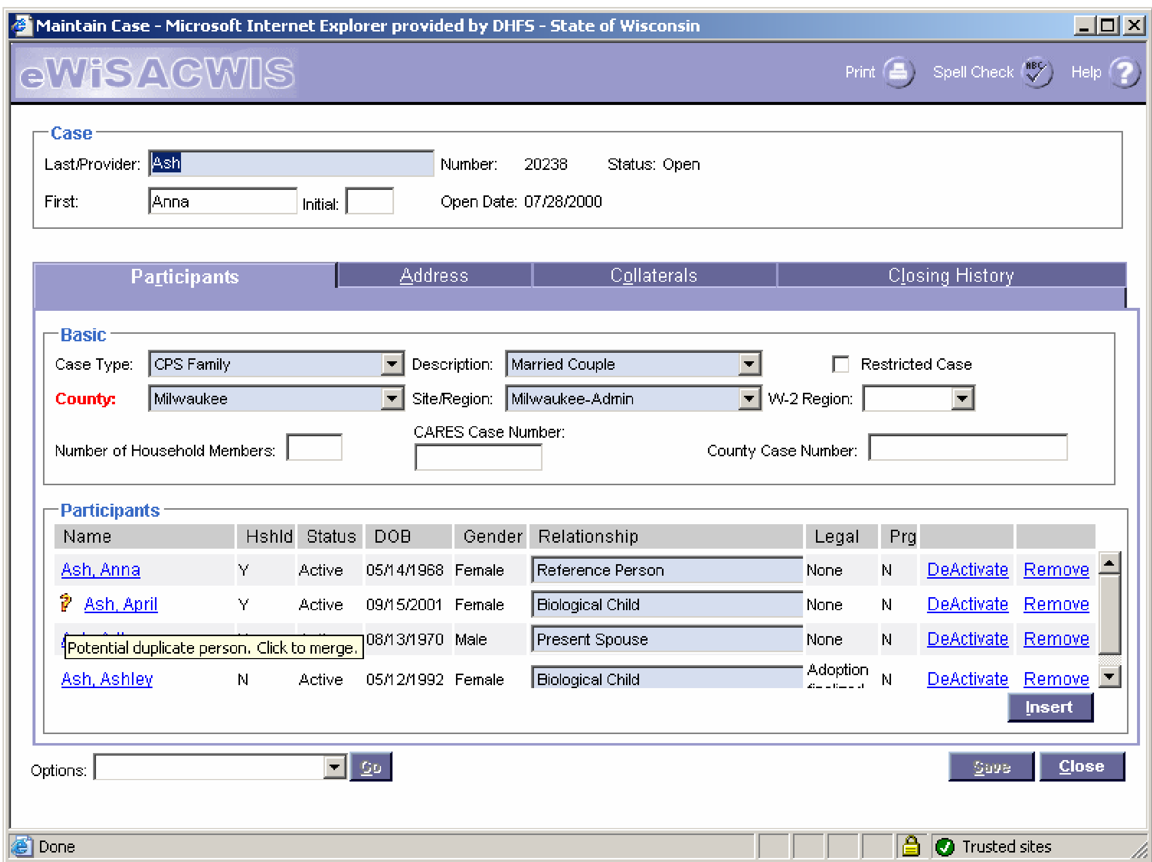


6. Select the ‘Save” button. A pop up message will appear asking if the user would like to merge the records. Select yes. This will merge the records through over night batch processing.



Merge – Maintain Case

1. The Case Maintenance page will be modified to display a '?' next to the name of the case participant that has been identified as a potential duplicate person. If the user clicks on the new '?' next to the participant's name, a screen tip will show up next to the icon: 'Potential duplicate person. Click to merge.'



2. If the user clicks the icon, the Person Merge page will display with the selected case participant identified as the ‘Keep Person’ with the associated potential duplicate persons displayed in the Potential Removal Persons group box allowing the user to quickly proceed with the person merge request.

3. If the user decides that the ‘Keep Person’ is not the correct participant, use the ‘Search’ hyperlink, next to the ‘Keep Person’s’ name to search out the appropriate participant to ‘Keep”.

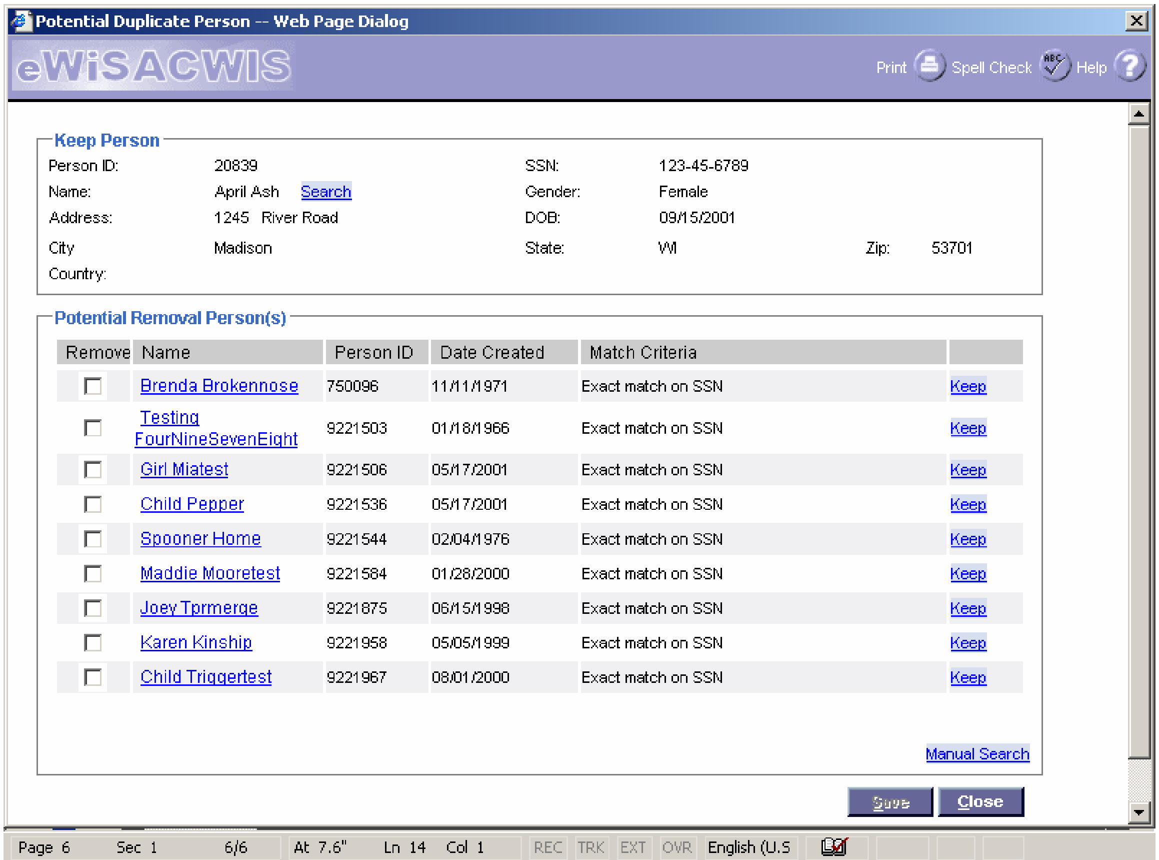
4. The case participant will have the potential duplicate person icon display if he/she matches with another person (Potential Removal Persons) in the system on one of the following criteria:

   - Exact match on social security number
   - Exact match on date of birth and last name, and the sounds like matches the first name.
   - Exact match on last name and first name, and exact match on any two of the three numbers of the birthday, month day and year.
   - Exact match on one last name to another person’s first name and first name to last and exact match on any two of the three numbers of the birthday, month day, and year.

5. The ‘Remove’ check box to the left of the potential removal person should be checked if this is identified as a duplicate to the ‘Keep Person’. The Potential Removal Person is a hyperlink. Use the hyperlink to identify demographic information for this potential duplicate.

   The ‘Keep’ hyperlink on the same line will move the Potential Removal Person up to the ‘Keep Person’ group box.

   The ‘Manual Search’ hyperlink will allow the user to search the system for other potential matches that have not been system identified.



Potential Duplicate Person -- Web Page Dialog

eWiSACWIS

Print Spell Check Help

Keep Person

Person ID:	20839	SSN:	123-45-6789		
Name:	April Ash Search	Gender:	Female		
Address:	1245 River Road	DOB:	09/15/2001		
City	Madison	State:	WI	Zip:	53701
Country:					

Potential Removal Person(s)

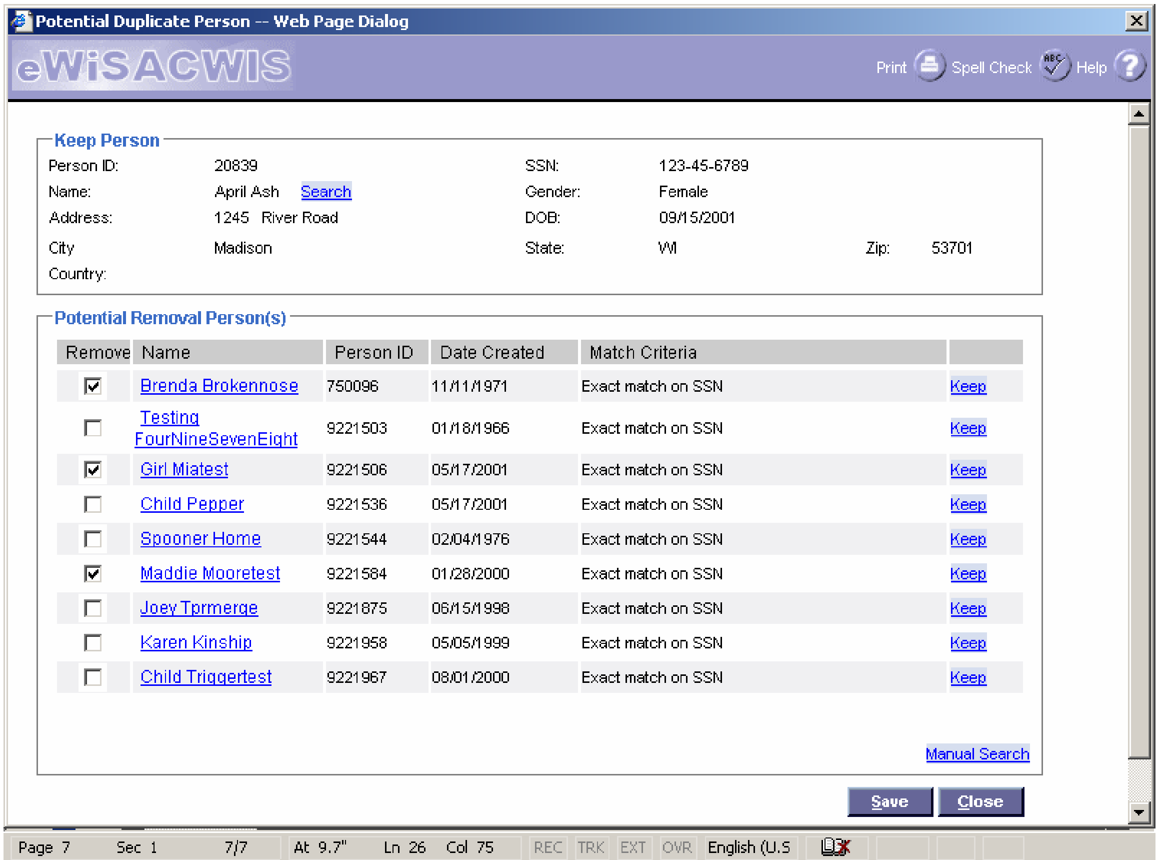
Remove	Name	Person ID	Date Created	Match Criteria	
☐	Brenda Brokennose	750096	11/11/1971	Exact match on SSN	Keep
☐	Testing FourNineSevenEight	9221503	01/18/1966	Exact match on SSN	Keep
☐	Girl Miatest	9221506	05/17/2001	Exact match on SSN	Keep
☐	Child Pepper	9221536	05/17/2001	Exact match on SSN	Keep
☐	Spooner Home	9221544	02/04/1976	Exact match on SSN	Keep
☐	Maddie Mooretest	9221584	01/28/2000	Exact match on SSN	Keep
☐	Joey Tprmerge	9221875	06/15/1998	Exact match on SSN	Keep
☐	Karen Kinship	9221958	05/05/1999	Exact match on SSN	Keep
☐	Child Triggertest	9221967	08/01/2000	Exact match on SSN	Keep

Manual Search

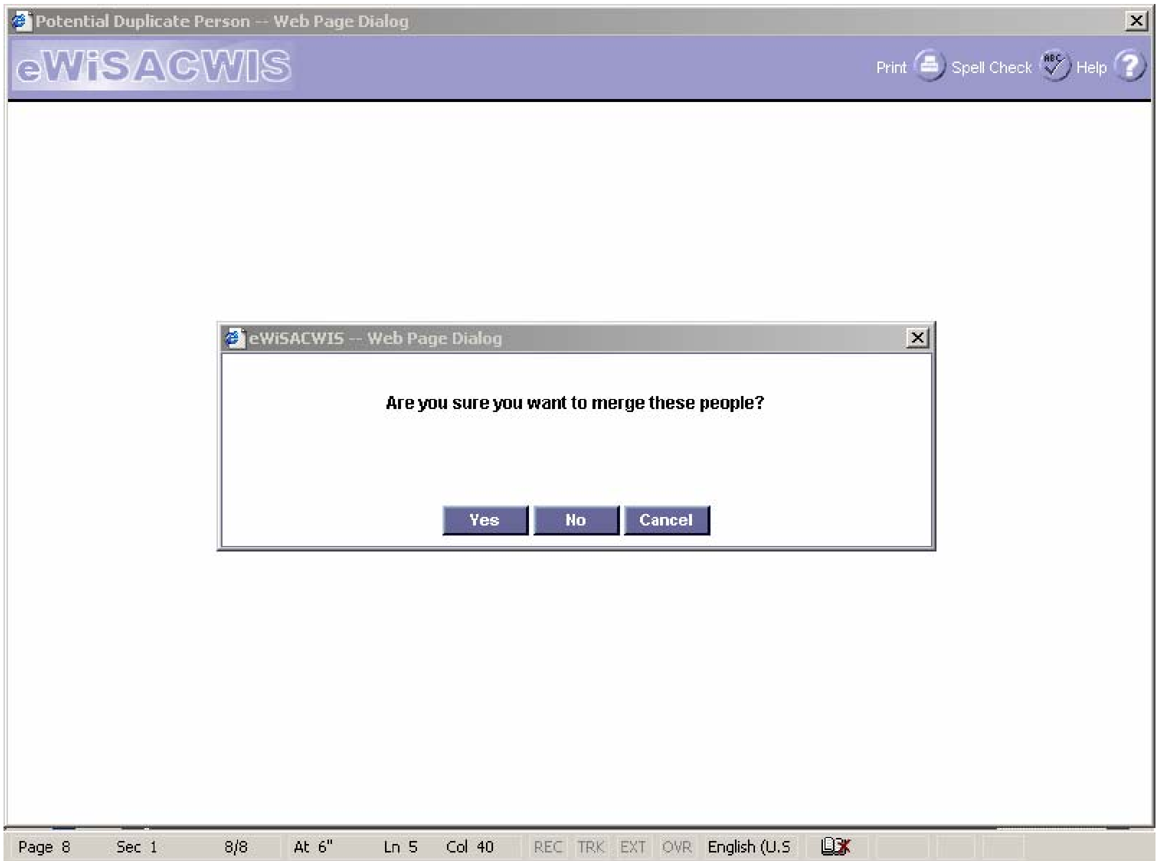
Save Close

Page 6 Sec 1 6/6 At 7.6" Ln 14 Col 1 REC TRK EXT OVR English (U.S

6. When all Potential Removal Persons have been identified, select ‘Save’.



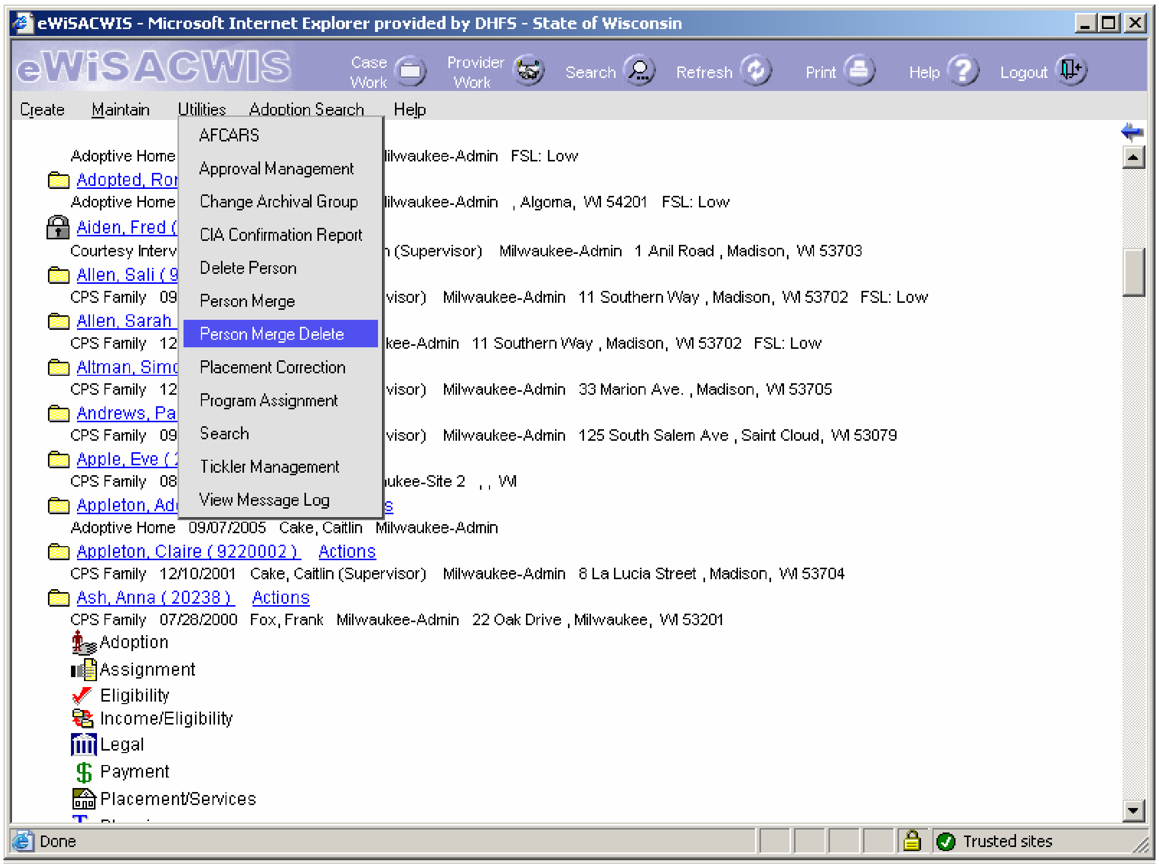
7. The following message will appear. Select ‘YES’ to merge.



8. Select the close button on the ‘Person Merge’ page to return to the ‘Maintain Case’ window.

Person Merge Delete

1. The Person Merge process can be stopped prior to overnight batch processing. From the desktop, select Utilities>Person Merge Delete.



2. The Person Merge Delete will identify all participants to be subject to the overnight batch Merge process and all participants who have had a merge request that failed due to system edits. People can be removed from this nightly batch by selecting the 'Delete' check box next to the appropriate participant line and selecting 'Save'.

The ‘Date Requested’ category will identify potential problems with a merge. If the date of the requested is older than the current date, the merge did not take place due to a potential problem with the ‘Keep’ or ‘Removed’ person. The potential person merge line will stay in the ‘Person Merge Delete’ group box until the user corrects the problem on line and allows the merge to run through the nightly batch processing – merge.